

<b>University Enterprises, Inc. Policies and Procedures</b>	<b>Policy No. 130</b>
<b>Section:</b>	Human Resources
<b>Policy:</b>	Educational Assistance
<b>Revised Date:</b>	March 15, 2018

## Educational Assistance

### I. PURPOSE

To promote the continuing education of employees by providing support and reimbursement for academic courses taken at Sacramento State and community colleges.

### II. SCOPE

- A. All full-time regular employees with satisfactory job performance records are eligible. Probationary and temporary employees are not eligible.
- B. Employees covered under the Memorandum of Understanding must follow the union contract provisions.
- C. Employees are financially responsible for any taxes levied on employer-paid Educational Assistance benefits.

### III. POLICY

- A. Course Requirements: Employees are encouraged to participate in programs of academic study leading to a degree. Courses not part of a degree program must: (1) be related to the duties of employee's current position or future job duties, or (2) courses must provide additional knowledge or skills to the employee that would benefit UEI.
- B. Grade Requirement: Employees taking undergraduate classes are required to earn a grade of "C" or better or a grade indicating satisfactory completion of the course. Employees taking graduate classes are required to earn a grade of "B" or better.
- C. Payment of Fees: Employees may receive reimbursement for tuition and mandatory campus fees prior to or after course completion given the following conditions or limitations:
  - 1. Unit Limitations: A total of 18 units per academic year may be taken with a maximum of six units each fall, spring and summer term, except for degree programs at the Sacramento State College of Continuing Education notwithstanding the course fee limitations established in Section III D. (A year being fall, spring and summer term in that order.)
  - 2. Institution Limitations: Employee Educational Assistance is limited to degree programs and other courses taken at Sacramento State, at a community college that has State of California funding support or degree programs at the Sacramento State College of Continuing Education. Degree programs and courses offered under a self-supporting program at a community college, taken at other colleges and universities, as well as technical or vocational schools, are not eligible.
- D. Course Fees: Fees may be reimbursed at a cost up to the equivalent of Sacramento State fees for zero to six units at the Post-Baccalaureate level. Educational Assistance is contingent upon the availability of funds in each department's budget and is not guaranteed. Employees are

responsible for confirming their eligibility for Educational Assistance and the availability of funds with their supervisor prior to incurring course fees.

- E. Books, Supplies, Miscellaneous Fees: University Enterprises does not pay for these items.
- F. Approval: Employees must submit a completed "Application and Questionnaire" form (available from Human Resources) for their supervisor and/or director's approval. The approved form must be submitted to Human Resources at least two weeks prior to registration. Human Resources reviews the employee's eligibility and as appropriate grants approval.
- G. Time Away From Work: If convenient for the department and approved by the supervisor and/or director, employees may schedule one course during a normal work shift with one hour per unit per week, up to three units of release time per semester or session. All other time off related to course work must be made up.

#### **IV. PROCEDURES AND RESPONSIBILITIES**

- A. Reimbursed Payment Before Course Completion: An employee may request pre-payment of applicable fees before the course is completed by indicating the pre-payment amount on the "Payment Agreement Form". The employee must also sign the agreement to repay the fees if: (1) a grade of "C" or better is not earned for undergraduate classes or a grade of "B" or better is not earned for graduate classes, (2) the employee does not complete the course, or (3) the employee leaves employment with University Enterprises prior to completing the course. Checks will be issued to the employee after a receipt showing the amount paid to the college or university is turned in to Human Resources. An official grade report must be submitted to Human Resources no later than one month after receipt of grades.
- B. Reimbursed Payment After Course Completion: If the employee is to be reimbursed after completing the course, they must present to Human Resources a receipt showing the amount of fees paid to the college or university and an official grade report indicating a grade of "C" or better for undergraduate classes or a grade of "B" or better for graduate classes no later than one month after receipt of grades.
- C. Possible Tax Implications: Legislation varies from year to year on the taxability of employer-paid Educational Assistance benefits. Employees should check with their tax advisor regarding any tax reporting requirements or liability.

#### **V. RELATED POLICIES**

- Policy No. 010      Definition of Employment Status/Appointment Codes
- Policy No. 105      Health and Welfare Benefits